



LIVE FREE

2020 Summer Advertising Effectiveness Research

October 2020



Background

- The travel and tourism sector has suffered its most difficult year ever in 2020 due to the COVID-19 pandemic that brought the industry to a halt in mid-March.
- What was initially expected to be a reasonably short event continues to drag on through the fall.
- In response to this situation, the New Hampshire Division of Travel and Tourism Development (the Division) halted its planned spring marketing efforts but began a Recovery campaign in early summer.
- This effort included a specific in-state focus to encourage residents to vacation in New Hampshire and support local business as well as out-of-state efforts.
- This research is specifically designed to measure the impact of this effort both on travel and spending as well as upon the health of the New Hampshire brand. The objectives of this seasonal advertising effectiveness research include the following:
 - Measure awareness of the summer 2020 advertising among the target audience;
 - Evaluate the efficiency of the Division's media buy through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
 - Assess the ability of the advertising to influence New Hampshire travel;
 - Calculate the number of ad-influenced trips, visitor spending, and return on investment;
 - Explore the impact of the advertising upon the brand;
 - Provide an initial review of resident sentiment; and
 - Forward insights into future refinement of the marketing.

Methodology

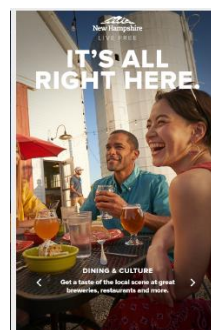
- As has been the case in prior advertising effectiveness research for the Division, an online survey was used so that respondents could view the actual advertising. This approach provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- This summer the campaign was focused upon states in the northeast; the Canadian markets included in the past not being targeted given international travel restrictions.
- A total of 1,753 surveys were completed across the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the research results. The questionnaire and the ads tested appear in the Appendix.

	Completed Surveys
New Hampshire	329
New York	481
Connecticut	199
Mass	346
Rhode Island	199
Maine/Vermont/New Jersey	199
Total	1,753

Campaign Overview

- While elements of prior campaigns were utilized in the executions, “Discover your New” was employed across all markets and targets.
- The budget for these efforts was considerably less than in the past several years – approximately less than half of the prior year.
- The media spend included linear TV, streaming video to reach cord cutters, out of home and digital display, social and radio.
- In terms of markets, no Canadian media was run, and New Hampshire was specifically targeted with different messaging and higher spending.

	2018	2019	2020	% Change
Spring/Summer	\$1,794,097	\$1,817,216	\$849,122	-53%



Channel	TV	CTV	OOH	Digital Display/ Social/Radio	Total
NH	\$30,154	\$16,154	\$39,375	\$100,568	\$186,251
NY	\$55,080	\$13,798	\$105,122	\$47,231	\$221,231
CT	\$27,838	\$13,798	\$7,950	\$47,233	\$96,819
MA	\$35,998	\$13,798	\$62,500	\$47,233	\$159,529
RI	\$27,561	\$13,798	\$15,700	\$47,233	\$104,292
ME/VT/NJ	\$75,000	\$0	\$0	\$6,000	\$81,000
Total	\$251,630	\$71,347	\$230,647	\$295,498	\$849,122

Insights

- Given the challenges presented by the COVID-19 pandemic, the results of the 2020 summer advertising effectiveness research are quite positive. Key insights include:
- Only about a third of consumers indicate that they are ready to plan travel – the rest are still playing a game of wait and see. Interestingly, this mindset translates into a competitive advantage for New Hampshire, as mountains, hiking trails and lakes are perceived as relatively safe locations. As a result, the states that are perceived as the least risky are New Hampshire, Maine and Vermont – while New York is perceived as the least safe.
- New Hampshire has made gains in key brand health metrics like top-of-mind consideration, share of familiarity, and share of likelihood to visit. Again, it is New York that took the biggest hit relating to these metrics.
- The 2020 summer advertising generated recall among 43% of consumers in the target markets, reaching 5.2 million households. The Division spent \$0.16 to reach a target household, which marks a gain in efficiency over prior campaigns and a notably efficient reach compared to the industry benchmark of \$0.51.
- TV/CTV is the most important awareness driver of the media employed. But all media reached consumers efficiently and contributed to critical media overlap.
- The 2020 summer advertising receives a positive response among both New Hampshire residents and those who live outside of the state. In fact, the out-of-staters give the ads stronger ratings than they gave the prior spring/summer campaign. This result is likely attributable to a receptive population ready to go out and positively reacting to a campaign that effectively promotes the types of locations and activities that feel the safest during the pandemic.

Insights Cont.

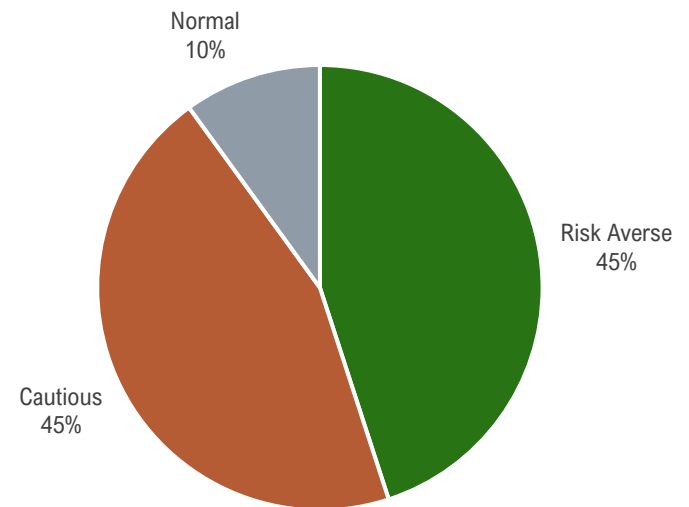
- The 2020 summer advertising has a positive impact on the New Hampshire brand and on travel to/within the state. Overall, the 2020 summer advertising influenced about 161,000 New Hampshire trips between July 2020 and October 2020 (the advertising began in late June). The nearby Massachusetts market contributed the greatest number of influenced trips, as it has a relatively large population and the strongest level of ad-influenced travel.
- The 2020 summer advertising returned \$199 in visitor spending and \$10.28 in tax revenue for each \$1 invested in the media buy. These ROI figures are comparable to the prior two spring/summer campaigns, which is a positive result given that the COVID-19 pandemic made 2020 the most difficult year ever for the travel and tourism industry.
- The impact of the pandemic is also apparent in the profile of New Hampshire visitor activities. That is, visitors were more likely to participate in many outdoor and/or social distance-friendly activities and less likely to participate in most indoor activities. The pandemic also had an impact on other New Hampshire trip specifics, including more family travel and higher average trip spending, as well as fewer visitors staying in hotels and more visitors staying with family/friends, in an Airbnb or vacation home, or camping.

Pandemic Environment

Pandemic Overview

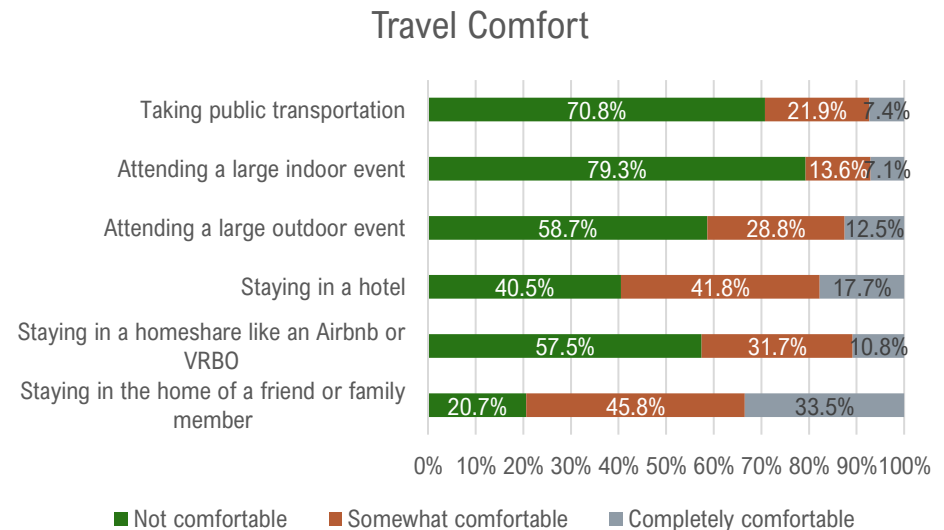
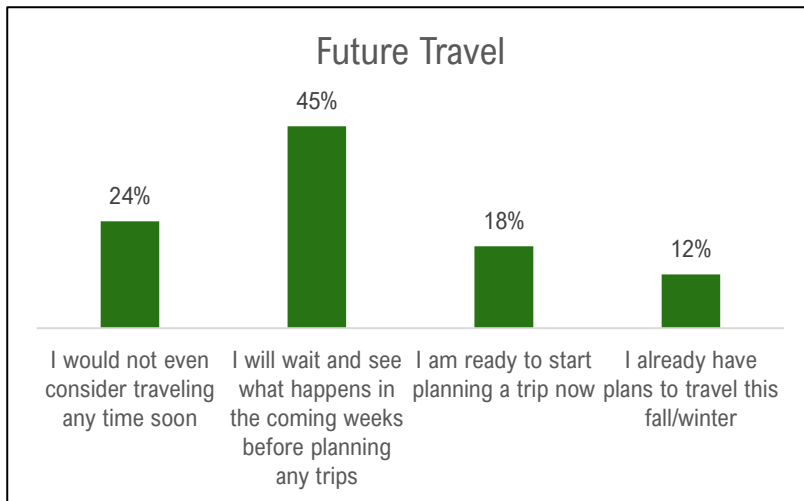
- COVID-19 has certainly reshaped travel. Obviously, the impact was felt immediately through a lockdown and restrictions. These measures have been gradually relaxed, but the recovery has been slow. This can be seen in metrics like hotel occupancy, which remains well below the prior year despite improving each month.
- This is evident in everyday behaviors as well. We characterize people into the three groups described below. Very few of us feel things are normal and we're evenly spread between risk averse and cautious.

Risk Averse	I believe it is still safer to stay home and venture out as little as possible (only for essential items or because of my job as an essential worker)
Cautious	I will take recommended precautions, but I'm going to start adding more activities back into my routine
Normal	I think restrictions have gone on too long and I'm going to resume as many normal activities as possible



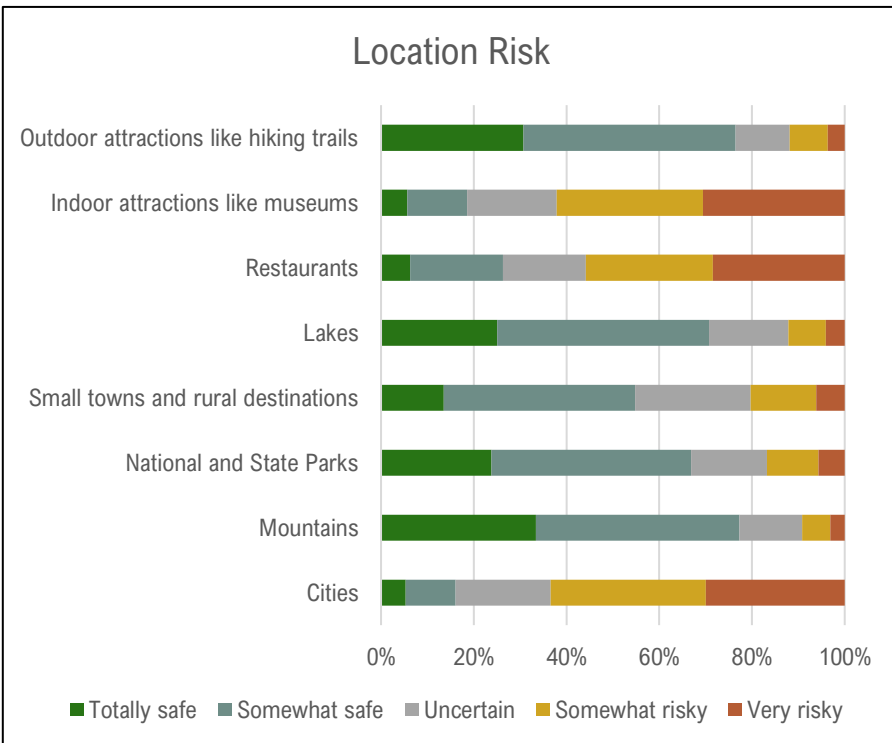
Risk Assessments

- How feelings about COVID translate into risk assessments and travel behavior explain some of the results that have been seen across the industry. Only about a third of the population feels ready to even plan – the rest of us are still playing a game of wait and see. This is little wonder given the discomfort in staying with a friend or in a hotel. And clearly most of us aren't ready to go to events.

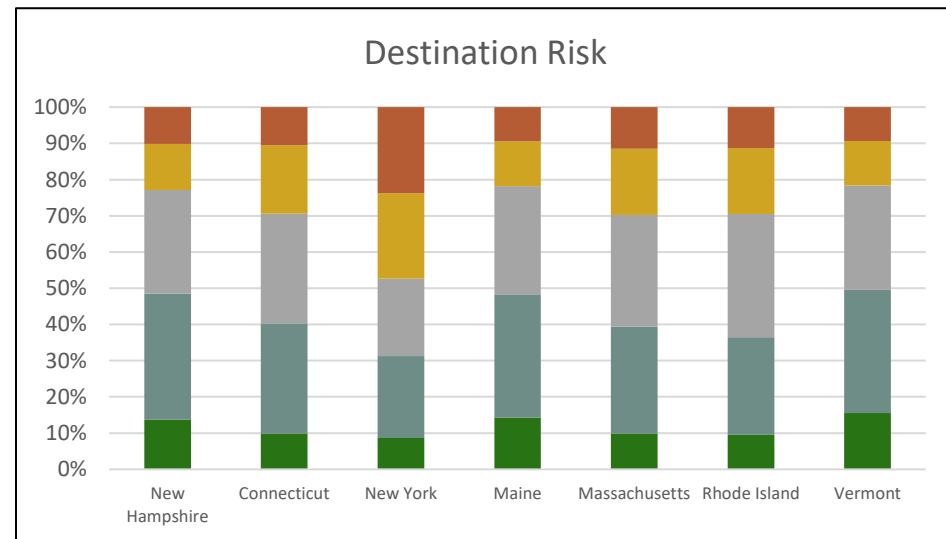


Impact on New Hampshire Appeal

- Interestingly, in many ways these attitudes and concerns translate into a competitive advantage for New Hampshire. Mountains, hiking trails and Lakes are perceived as safer locations.



- So, not surprisingly, the states that are least risky are New Hampshire, Maine and Vermont – with New York taking a big hit.



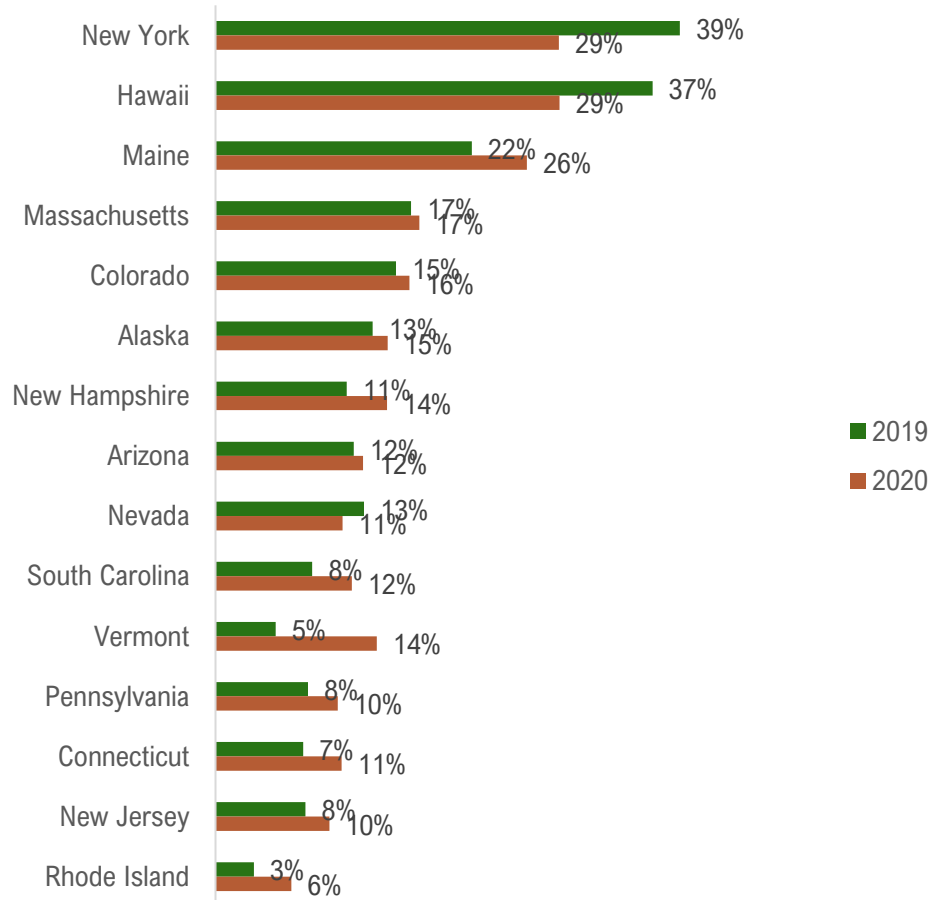
Brand Health

Brand Health Considerations

- Historically, the key focus of advertising effectiveness research has centered upon incremental travel and return on investment – or simply the payback on the promotion of the state as a destination.
- In the context of the pandemic, it's important to take a broader view and think about the state of the New Hampshire brand. In the immediate term, it is reasonable to believe that travel will be depressed. But advertising has impact beyond generating a trip by building an image of the state and strengthening its appeal.
- So, before we look at advertising and its impact, we first want to consider how the brand itself has fared in the past year in terms of overall appeal.

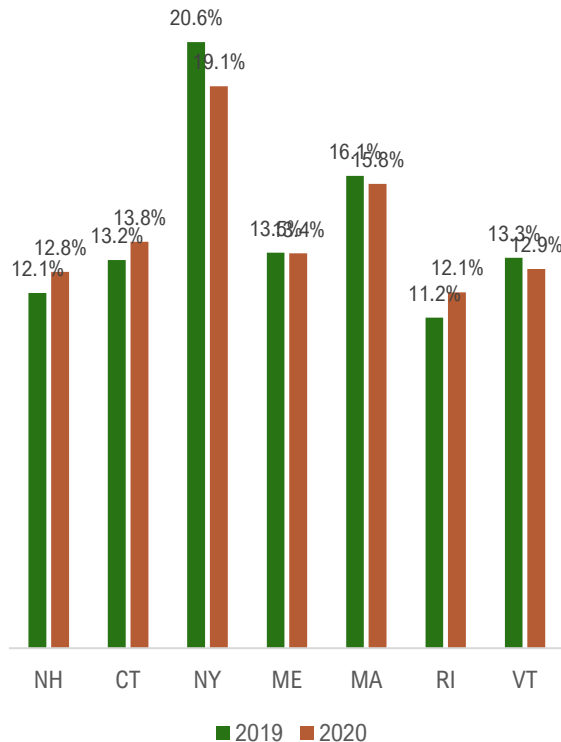
Top of Mind Consideration

- One of the more interesting assessments focuses upon the places that come to mind as good states to visit in an unaided fashion – what could be called top-of-mind consideration.
- In the environment of the pandemic where we have seen appeal skewing toward outdoor locations, the biggest gainers are places like New Hampshire, Vermont and Maine. Once again, the outdoor product focus is ideally positioned in this context.
- The states that suffer most are places like New York where the focus is on the city and which people feel less comfortable visiting. And interestingly, Hawaii – no doubt in part because of the long plane ride required. While not shown in this chart, California and Florida have also experienced large declines.



Familiarity Share

Familiarity Share

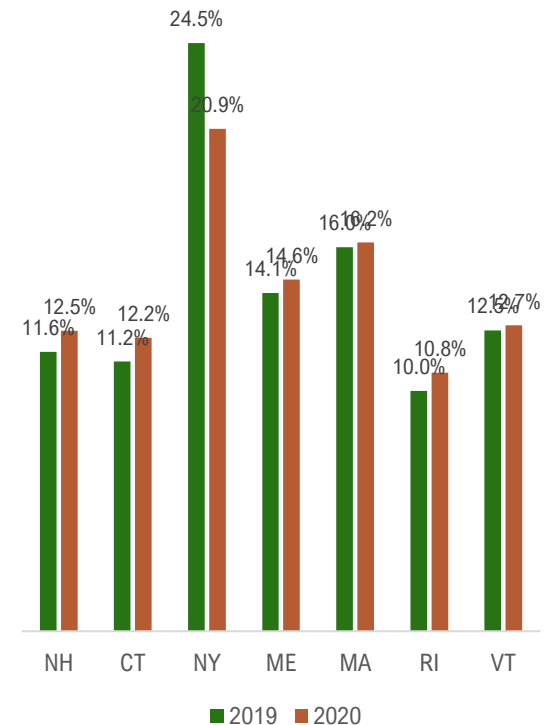


- It has long been established that marketers who aggressively promote in hard economic times generally have a stronger recovery and capture more market share when times improve.
- Obviously, economic realities often make this difficult to do no matter the positive strategic benefit.
- A similar result could ensue during this time where promotion could help build the brand and yield positive impacts in the future.
- Familiarity clearly isn't solely a function of promotion. But it is interesting to see that New Hampshire has had a slight gain in its level of familiarity compared especially to destinations like New York.

Likelihood Share

- While these are positive findings about the brand, probably the single biggest attitudinal measure is likelihood to visit. Not surprisingly, likelihood to visit every destination this coming fall and winter has significantly declined.
- Instead, here we are looking at share of potential likelihood. And once again, New Hampshire shows a gain in this typically extraordinarily stable measure. And again, New York shows the greatest decline.

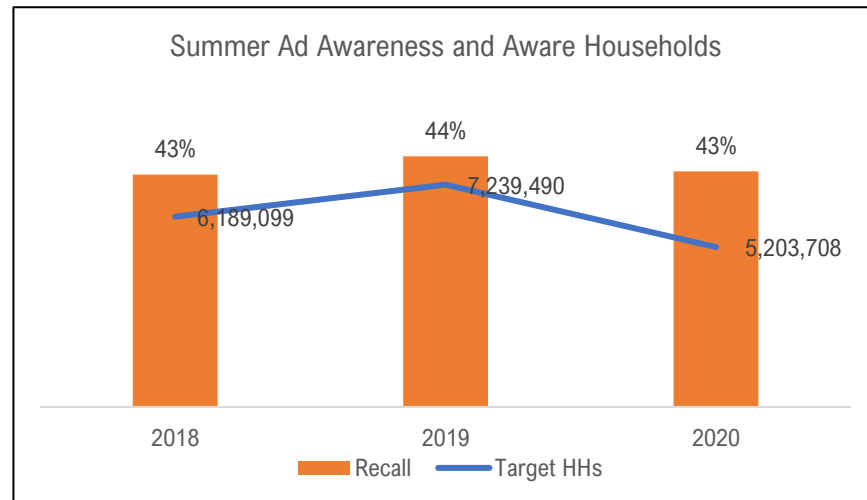
Likelihood Share



Ad Awareness

Overall Awareness

- Overall ad awareness levels were essentially unchanged despite a drastically smaller media spend.
- However, it is important to note that this spend was targeted to fewer households overall given the omission of the Canadian markets.
- Nonetheless, the campaign was remarkably efficient and reached more than 5 million households at a tremendously low rate of \$0.16 a household.

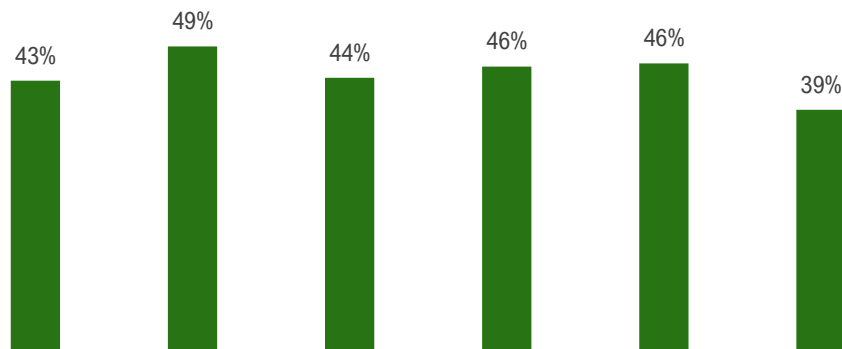


	2018	2019	2020
Target HHs	14,496,273	16,275,450	12,147,318
Recall	43%	44%	43%
Aware HHs	6,189,099	7,239,490	5,203,708
Media Spending	\$1,794,097	\$1,817,216	\$849,122
Cost per Aware HH	\$0.29	\$0.25	\$0.16



Awareness by Market

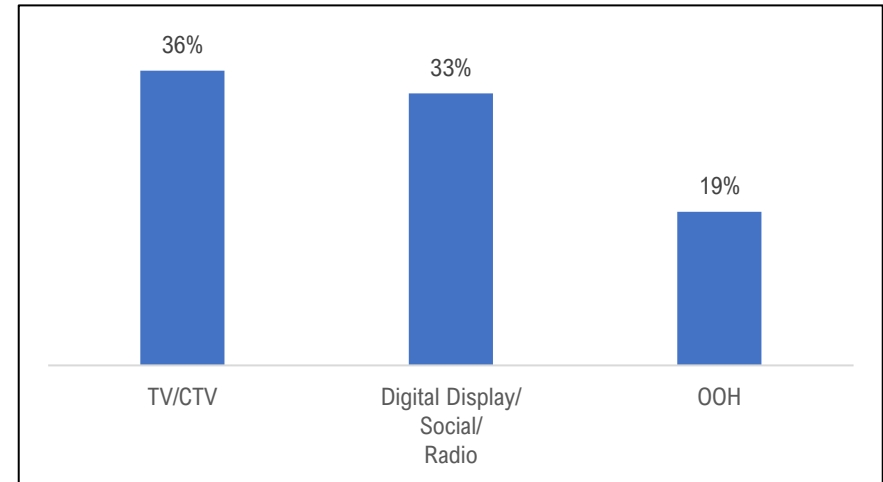
- This year's media expenditures were reported by state rather than DMA.
- The differences in the level of ad awareness among the states are generally small.
- In-state residents recorded the highest overall level of awareness with this campaign uniquely targeted to them. Of course a large spend on a small population yielded a relatively high cost per aware household.
- Conversely, a relatively small spend in Maine/Vermont/New Jersey resulted in lower levels of awareness but also a lower cost per aware household.



	New York	New Hampshire	Massachusetts	Rhode Island	Connecticut	Maine/Vermont/ New Jersey	Total
Target HHs	5,474,594	391,741	1,937,419	308,391	1,016,939	3,018,233	12,147,318
Awareness	43%	49%	44%	46%	46%	39%	43%
Aware HHs	2,378,774	191,703	851,120	141,023	470,143	1,170,945	5,203,708
Media Spending	\$221,231	\$186,251	\$159,529	\$104,292	\$96,819	\$81,000	\$849,122
Cost per Aware HH	\$0.09	\$0.97	\$0.19	\$0.74	\$0.21	\$0.07	\$0.16

Awareness by Medium

- The TV/CTV ads and various digital media ads received the largest investment – and generated the highest awareness.
- Out of home, understandably performs less well given its necessarily more limited reach.
- But given the levels of awareness and investment, the cost per aware household is similar across media.

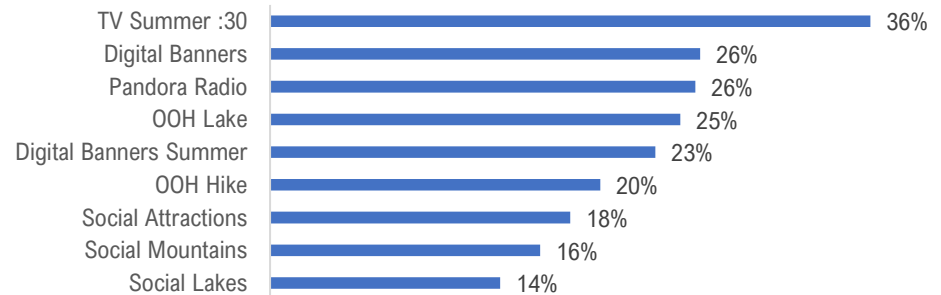


	TV/CTV	Digital Display/ Social/ Radio	OOH
Target HHs	12,147,318	12,147,318	12,147,318
Awareness	36%	33%	19%
Aware HHs	4,331,248	3,998,498	2,258,393
Media Spending	\$322,977	\$295,498	\$230,647
Cost per Aware HH	\$0.07	\$0.07	\$0.10

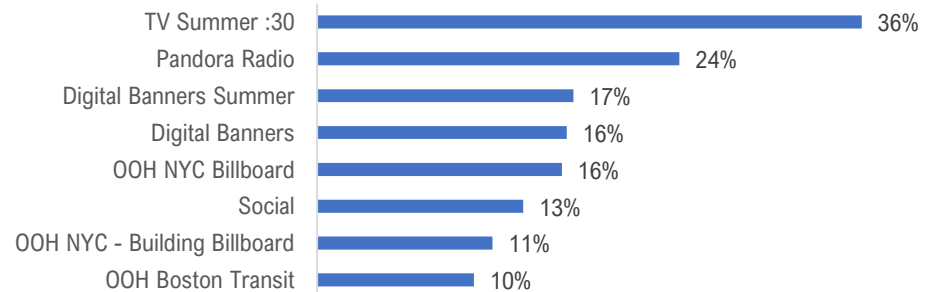
Awareness by Creative

- When the awareness levels of the individual assets are considered, the importance and strength of TV in driving awareness becomes apparent.
- In both the in-state and out-of-state markets, TV generated significantly more awareness overall.
- Out-of-state, the out-of-home ads were the weakest performing assets from an awareness perspective.

In-State Ad Awareness



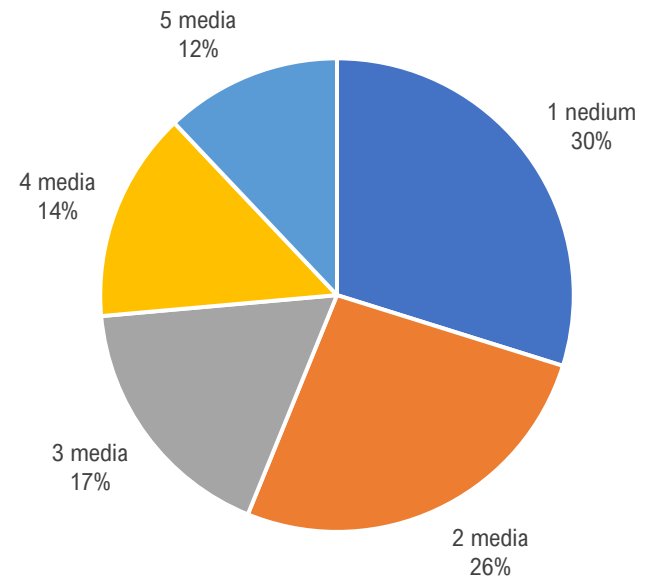
Out-of-State Ad Awareness



Media Overlap

- Exposing consumers to advertising across media generally increases ad impact. Each medium plays a role that can influence consumers at various stages of the travel journey. For instance, TV and digital video help to build the overall brand, while digital banners and social media ads can help to close the sale. The impact of media overlap is reviewed later in this report; first we consider the level of overlap attained.
- Of those aware of any ads, seven in 10 are aware of ads in multiple media. Almost a third recall seeing ads in four or five media.

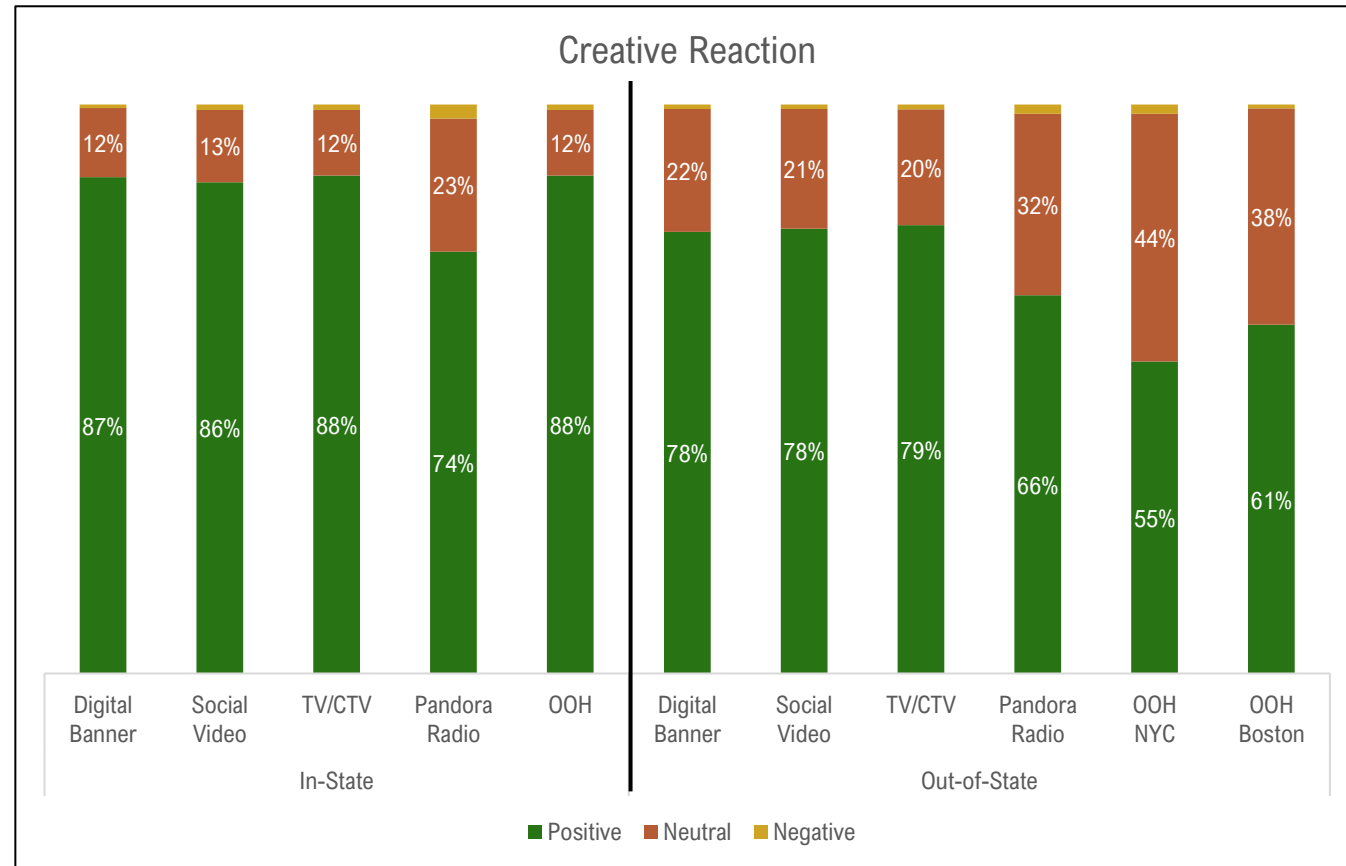
Number of Media Seen
(among those aware of any ads)



Creative Ratings

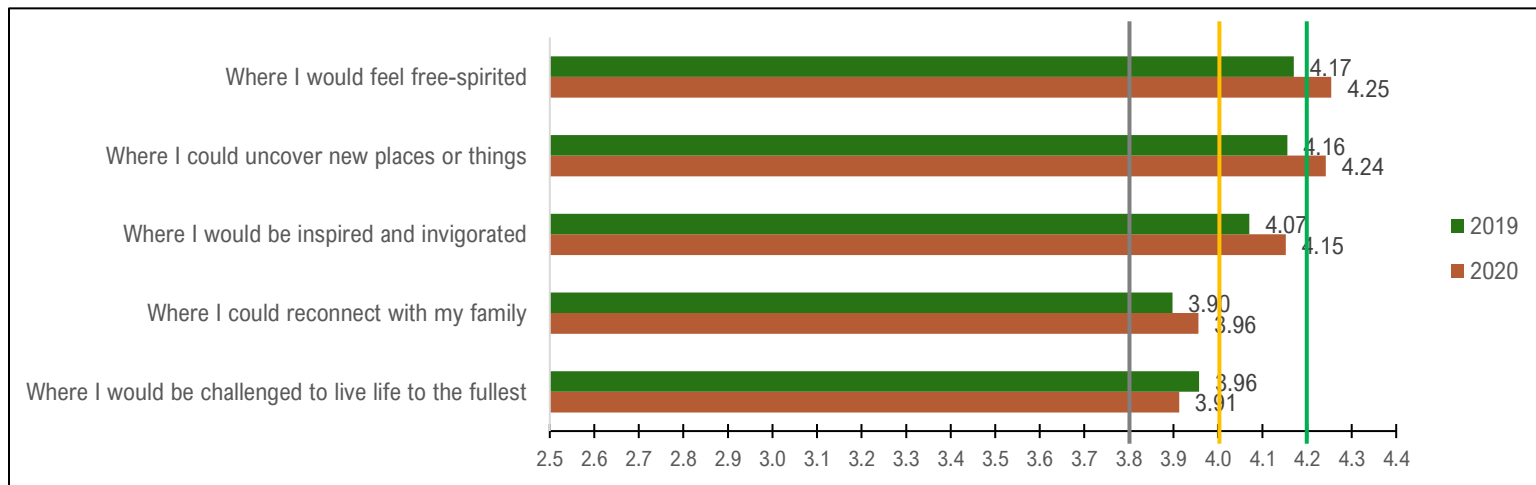
Creative Reaction

- The overall reactions to the creative are generally enormously positive.
- Especially in-state, which is typically the case, the reaction to the ads are positive by nearly nine out of 10 respondents. Radio receives the lowest rating – which given the visual nature of the tourism product is nearly always the case.
- While the out-of-state reactions are less positive, they are generally more positive than last summer and nearly eight out of 10 like the ads. Radio and out of home do significantly less well. The out-of-home ratings likely suffer given the challenge of showing them in context in the survey.



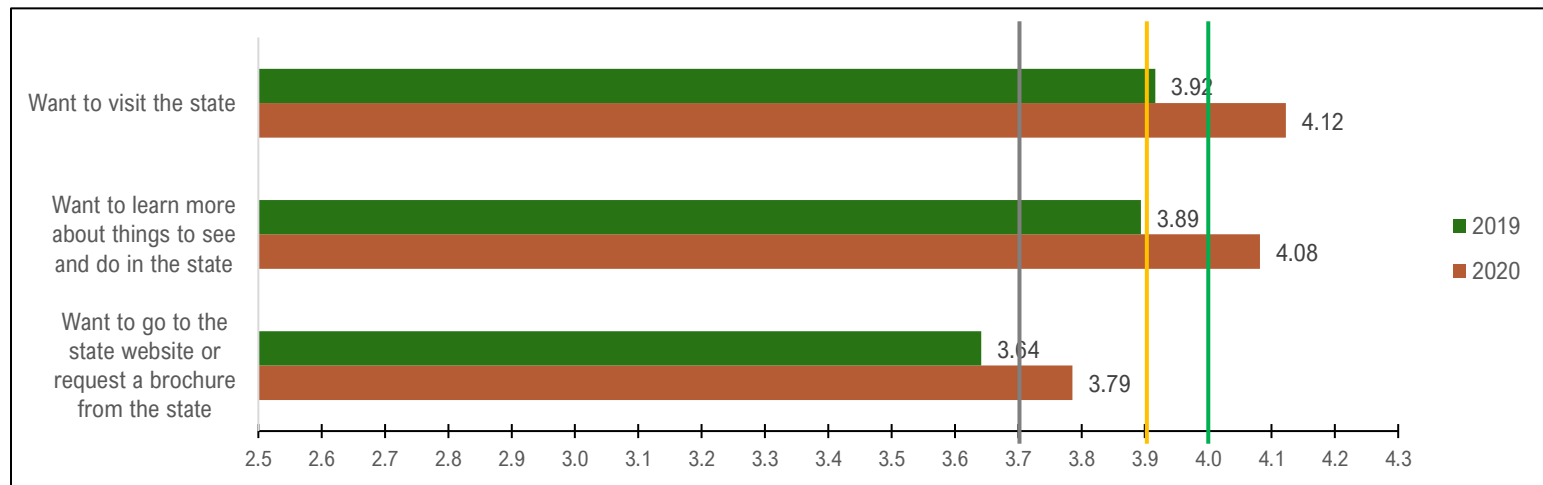
Out-of-State Communication Attributes

- Given different out-of-state markets between this year and last, the creative ratings from last year were recalculated with the same out-of-state market composition as this year to allow for direct comparison.
- While the 2020 ads used the “Discover your New” concept, much of the campaign maintained similar elements to last year’s. Interestingly, however, the ads rate better on all the communication attributes except living life to the fullest – and are at or near the “excellent” benchmark.
- With a similar campaign this result is mostly attributable to context – a receptive population ready to go out and positively reacting to a well-done campaign featuring outdoor activities.



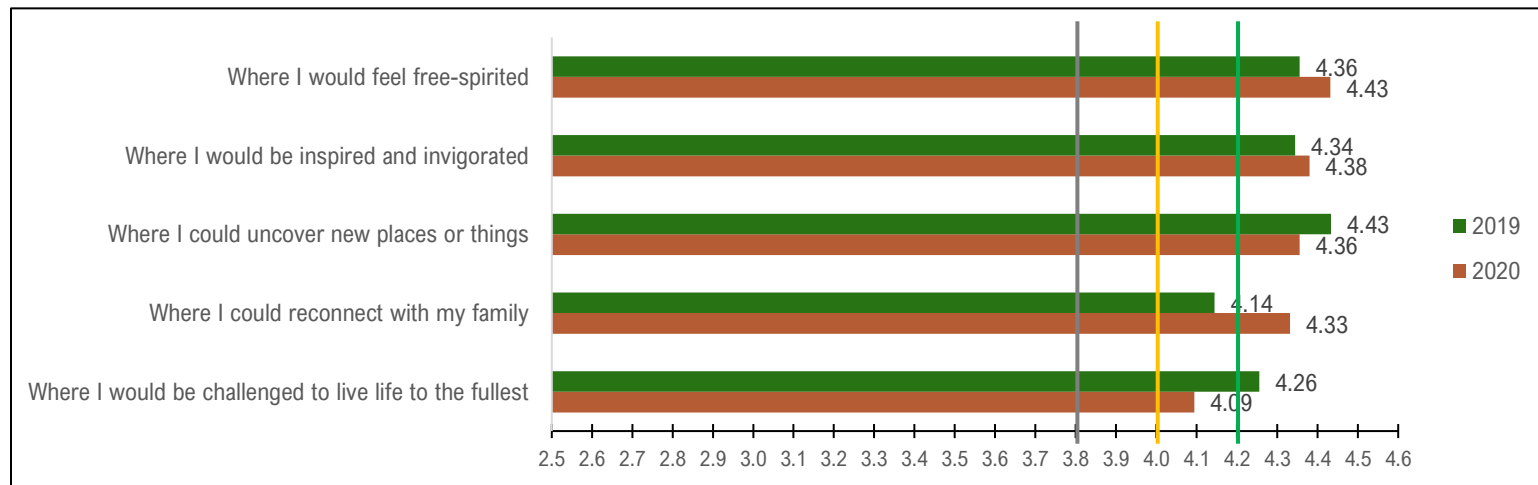
Out-of-State Impact Attributes

- The 2020 advertising also receives stronger ratings than the 2019 advertising on the attributes relating to generating interest in visiting the state.
- Again, this result is likely attributable to a receptive population ready to go out and positively reacting to a campaign that effectively promotes the types of locations and activities that feel the safest during the pandemic.



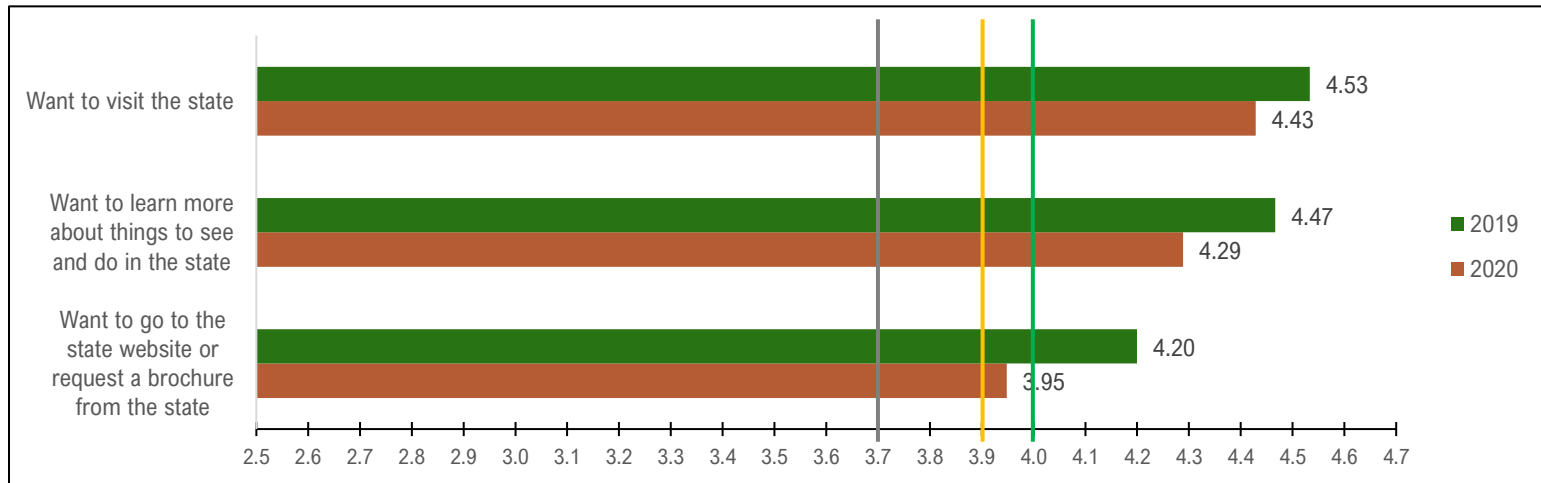
In-State Communication Attributes

- New Hampshire residents generally give the advertising excellent ratings.
- Some ratings improved year-over-year, most notably *where I could reconnect with my family*. Context is again critical, as New Hampshire residents likely think of their home state and its attractions as an accessible and safe place for family bonding during the pandemic. In contrast, *living life to the fullest* is not the prevailing sentiment while we're quarantined and socially distanced.



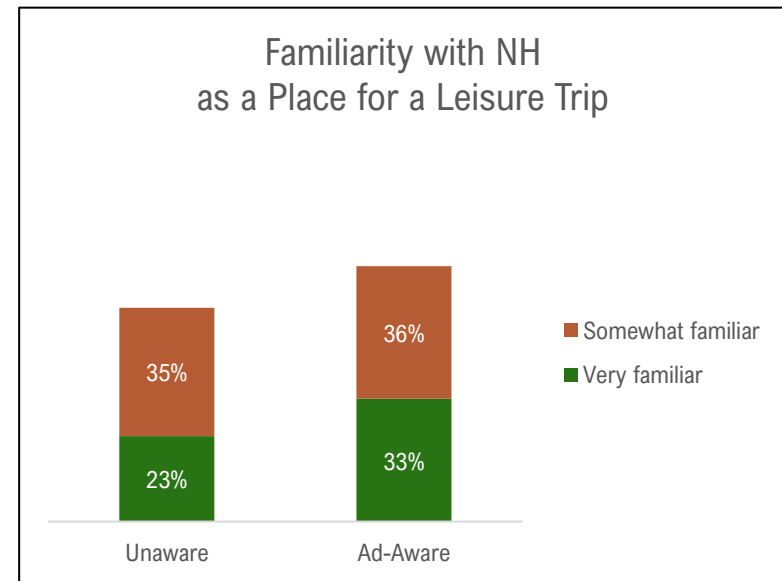
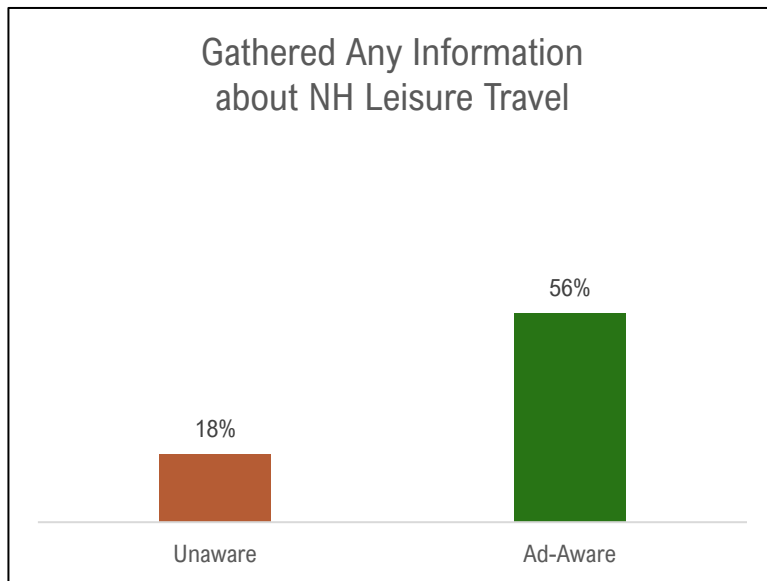
In-State Impact Attributes

- While the in-state impact ratings declined year-over-year, the ratings for making residents *want to learn more about the state* and *want to visit the state* are well above the excellent benchmark threshold.



Advertising Impact

Info Gathering & Familiarity



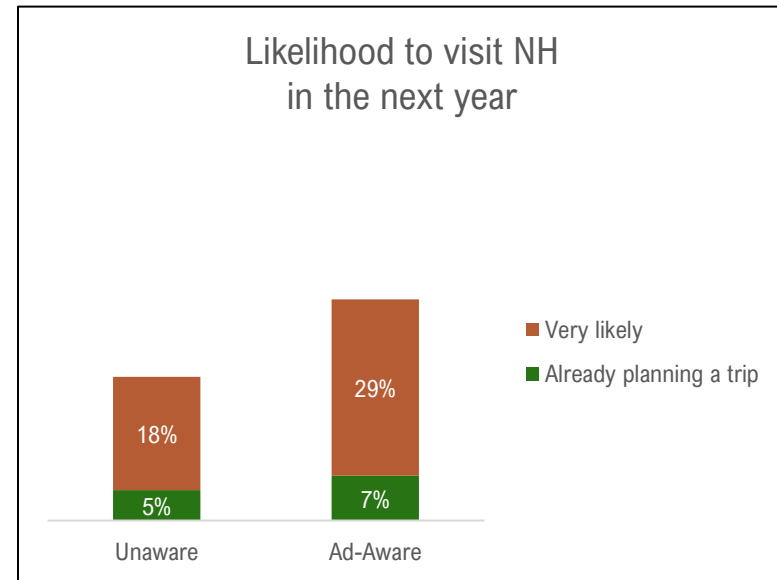
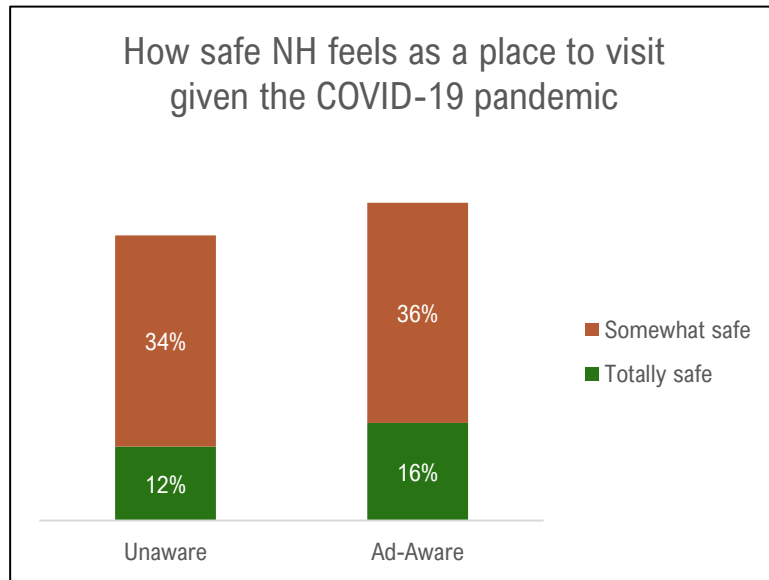
- The 2020 summer campaign prompts consumers to gather information about New Hampshire leisure travel.
- As a result of spurring information gathering – and the ads themselves showcasing the leisure travel product – those aware of the ads are more familiar with New Hampshire’s leisure travel product than are those who are not aware of the ads.

Perceptions

- It is critical for the advertising to strengthen the brand so that New Hampshire is in a strong competitive position coming out of the pandemic.
- The advertising is certainly accomplishing this objective, as those aware of the ads give the state higher ratings on all specific image attributes.

New Hampshire...	Unaware	Ad-Aware	Difference
Is a good place to go to the beach	3.32	3.72	0.40
Is a good place for water activities	3.72	4.03	0.30
Is a good place for shopping	3.69	3.93	0.24
Is a fun and exciting place	3.83	4.06	0.23
Always has something new to discover	3.84	4.07	0.23
Is unique because of the variety of destinations and activities it offers vacationers	3.84	4.03	0.19
Has interesting historical sites and museums	3.78	3.95	0.16
Offers great vacations for people like me	3.98	4.14	0.16
Is safe	3.91	4.07	0.16
Is a great place to vacation when traveling with children	3.97	4.12	0.15
Is affordable	3.98	4.12	0.14
Is rich in culture and the arts	3.54	3.69	0.14
Has great parks	4.03	4.17	0.14
Is a kid-friendly vacation destination	4.01	4.14	0.13
Is a place I would be excited to visit for a leisure trip	3.97	4.10	0.13
Is a good place for fairs and festivals	3.90	4.01	0.12
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.82	3.93	0.11
Offers an attractive lifestyle	3.89	4.00	0.11
Is easy to get to	4.21	4.32	0.11
Offers lots of outdoor recreation	4.28	4.37	0.09
Is beautiful	4.39	4.46	0.07

Safety & Intent



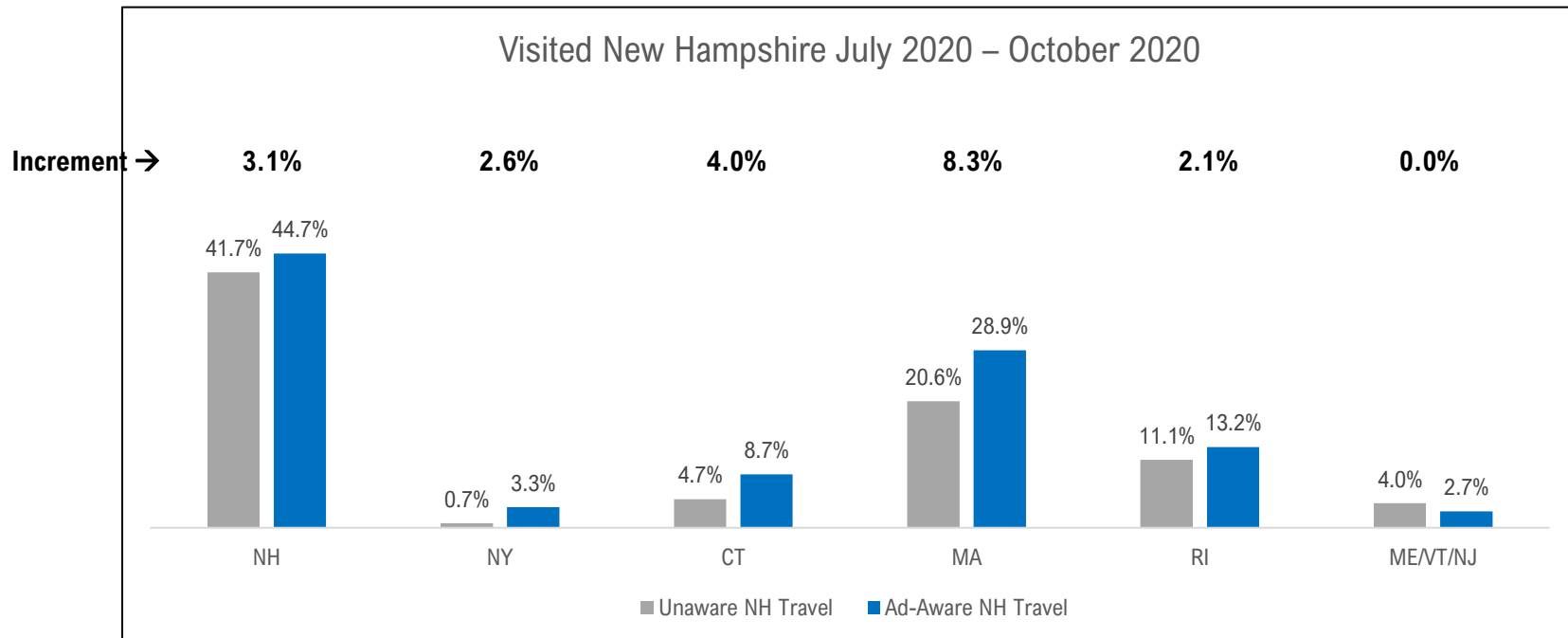
- The advertising also has a positive impact on the perception of safety given the pandemic and on intent to visit New Hampshire in the next year.
- What follows is a review of advertising impact on New Hampshire travel after the advertising began in June 2020 and the associated return on investment.

Incremental Travel Review

- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to New Hampshire even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among unaware households is considered the base and what the state would see without the marketing campaign. Any travel above that base by aware households is what is considered influenced. As such, this is a conservative measure of influence.
- The travel period for this 2020 summer advertising impact evaluation is July through October (after the advertising began in late June).



Incremental Travel



- The 2020 summer advertising influenced New Hampshire travel from all markets except for the group that received relatively light media weight (ME/VT/NJ).
- The strongest impact was realized in Massachusetts.

Incremental Trips

	NH	NY	CT	MA	RI	ME/VT/NJ	Total
Target HHs	391,741	5,474,594	1,016,939	1,937,419	308,391	3,018,233	12,147,318
Ad Awareness	49%	43%	46%	44%	46%	39%	43%
Ad-Aware HHs	191,703	2,378,774	470,143	851,120	141,023	1,170,945	5,203,708
Incremental Travel	3.1%	2.6%	4.0%	8.3%	2.1%	0.0%	3.1%
Incremental Trips	5,854	62,181	18,913	70,888	2,927	0	160,763

- Overall, the 2020 summer advertising influence about 161,000 New Hampshire trips between July 2020 and October 2020.
- The nearby Massachusetts market contributed the greatest number of influenced trips, as it has a relatively large population and the strongest level of ad-influenced travel.

Return on Investment

	2018 Spring/Summer	2019 Spring/Summer	2020 Summer
Influenced Spring/ Summer Trips	399,487	317,107	160,763
Avg. Trip Spending (among ad-aware visitors)	\$804	\$1,042	\$1,053
Influenced Trip Spending	\$321,101,120	\$330,339,600	\$169,243,990
Media Spending	\$1,794,097	\$1,817,216	\$849,122
ROI	\$179	\$182	\$199

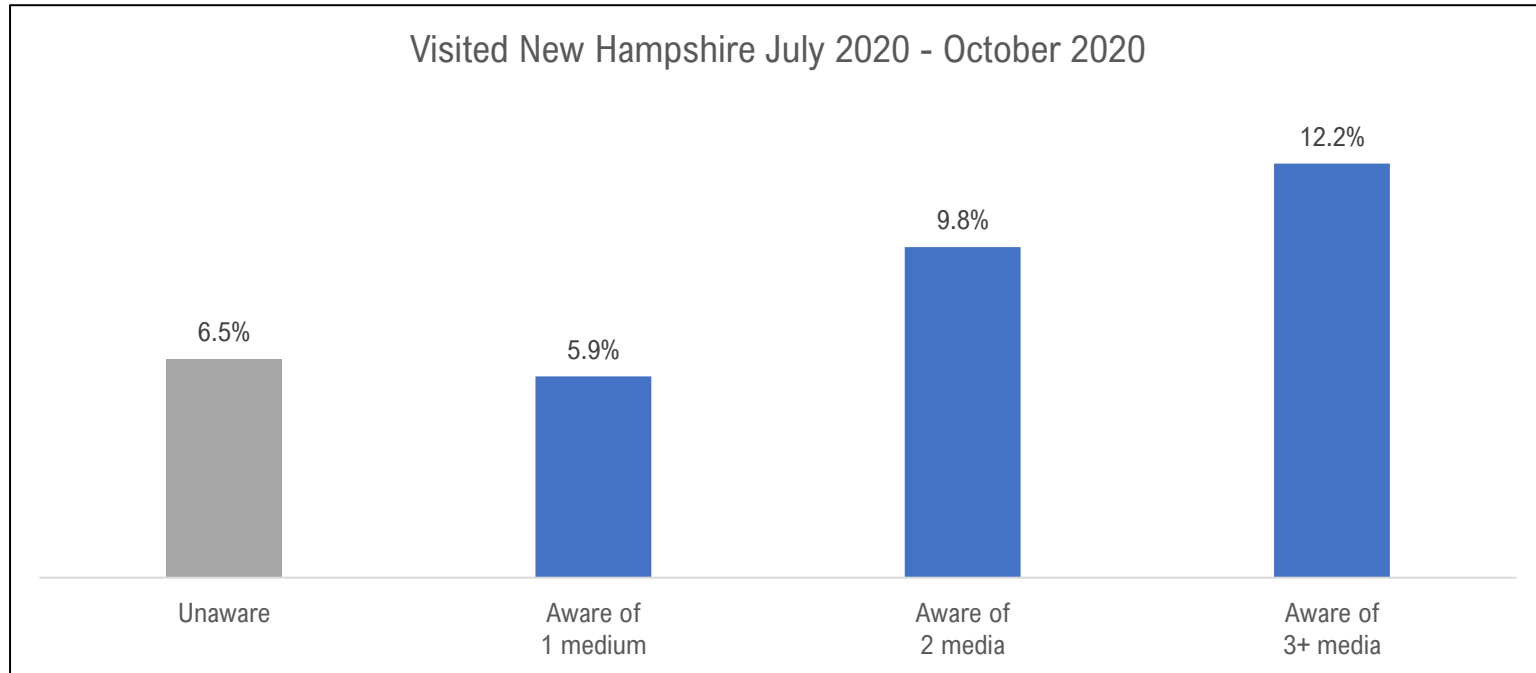
- The 2020 summer advertising returned \$199 in visitor spending for each \$1 invested in the media buy.
- This ROI is only slightly higher than the prior two spring/summer campaigns despite the fact that the COVID-19 pandemic made 2020 the most difficult year ever for the travel and tourism industry.

Tax Return on Investment

	2018 Spring/Summer	2019 Spring/Summer	2020 Summer
Influenced Trips	399,487	317,107	160,763
Avg. Taxable Spending (among ad-aware visitors)	\$598	\$680	\$603
Influenced Taxable Spending	\$238,957,240	\$215,567,826	\$97,014,255
Taxes Generated	\$21,506,152	\$19,401,104	\$8,731,283
Media Spending	\$1,794,097	\$1,817,216	\$849,122
Tax ROI	\$11.99	\$10.68	\$10.28

- Of the ad-influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so only those related to lodging, meals and transportation are taxed.
- Based on the average visitor spending on the taxable categories, the 2020 summer advertising generated \$8.7 million in taxes. Given media spending, the 2020 summer ads returned \$10.28 in tax revenue for each \$1 invested.
- These mark slight declines compared to the prior two spring/summer campaigns, but it is still a positive result that the advertising was able to influence tax revenue and a tax ROI in the context of the pandemic.

Media Overlap Impact



- Exposing consumers to advertising in multiple media is critical for influencing travel, as those aware of ads in only one medium do not contribute to incremental travel.

Trip Specifics

Trip Activities Change

New Hampshire Trip Activity	2019	2020	Difference
Scenic drive	9%	48%	39%
Shopping	9%	40%	31%
Visiting historical sites	7%	23%	16%
Fishing	6%	18%	12%
Farmer's markets/U-picks/roadside stand	6%	15%	9%
Camping	12%	21%	9%
Bicycling or mountain biking	8%	14%	6%
Hunting	1%	6%	5%
Hiking or backpacking	31%	36%	5%
ATVing	2%	6%	3%
Horseback riding	4%	7%	3%
Winery tours	7%	9%	3%
Boating	13%	15%	2%
Rock climbing	5%	7%	2%
Farm to table dinner	11%	12%	1%
Attending a festival or fair	8%	9%	1%
Beer trail	8%	8%	0%

New Hampshire Trip Activity	2019	2020	Difference
Visiting museums	8%	7%	-1%
Canoeing or kayaking	18%	17%	-1%
Visiting a state or national park	33%	31%	-2%
Wildlife watching	24%	20%	-4%
Attending a play or concert	12%	8%	-4%
River rafting	10%	6%	-4%
Bird watching	17%	11%	-6%
Attending performing arts (music/theater)	16%	6%	-10%
Golfing	19%	7%	-12%
Dining at locally owned restaurants	59%	45%	-14%
Sightseeing tour	52%	14%	-38%
Visiting a noteworthy bar or nightclub	56%	9%	-47%

- The impact of the pandemic is also apparent in the profile of New Hampshire visitor activities.
- That is, visitors were more likely to participate in many outdoor and/or social distance-friendly activities and less likely to participate in most indoor activities. Some outdoor activities such as visiting parks saw no growth, but this is because it is a top activity regardless of the pandemic.

Other Trip Specifics Change

- The pandemic also had an impact on other New Hampshire trip specifics, including:
- More family travel and higher average trip spending.
- Less visitors staying in hotels, and more visitors staying with family/friends, in an Airbnb or vacation home, and more camping.

Trip Specifics	2019 Spring/Summer	2020 Spring/Summer
Nights in New Hampshire	3.0	3.1
People in your travel party	3.2	3.0
Kids on trip	31%	40%
Overall average spending	\$882	\$961
Per person/per day spending	\$94	\$102
Lodging		
Mid-level hotel	29%	23%
Home of family or friends	21%	33%
Budget hotel or motel	12%	11%
Bed and breakfast/Inn	12%	7%
Airbnb	12%	16%
Camping/RVing	9%	17%
High-end full-service hotel	8%	6%
Luxury resort hotel	7%	8%
Vacation home	5%	15%

Appendix: Questionnaire

**New Hampshire Tourism
Summer Ad Effectiveness
October 2020**

ZIP. What is your postal/ZIP code? _____

These are the screeners to identify leisure travel decision makers.

S1. Please indicate if each of the following apply to you.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		
<i>The coronavirus/COVID-19 is impacting Americans' lives to varying degrees. However, for this question we are interested in your travel behavior under normal circumstances</i>		
(IF =0, TERMINATE AFTER SCREENING QUESTIONS)		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		
I use video streaming services like Hulu or Netflix		
I like to travel during the fall to view the changing leaves		
I'm interested in taking winter vacations that involve skiing or snowboarding		

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

AGE. What is your age? _____ [TERMINATE under 18 - over 65]

Social. Which of the following social networking sites do you use?

Select all that apply.

- Pinterest
- Snapchat
- Instagram
- YouTube
- Twitter
- Facebook
- Travel review sites such as TripAdvisor
- Other, please specify _____
- None of these

1

Questions 1-5 will be used to evaluate the impact of the advertising on top-of-mind recall, familiarity and travel.

1. Thinking about places to go for domestic leisure trips, what U.S. STATES come to mind as good places to go? (USE DROP DOWN LISTS)

STATE #1 _____
STATE #2 _____
STATE #3 _____
STATE #4 _____
STATE #5 _____

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

3. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you most prefer to visit for a leisure trip within the next year? Please select only one. [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	

5. Have you visited any of the following states since March 2020 for a leisure trip? How many trips did you take in each state since March 2020?

[ROTATE]	States visited since March 2020 (Select all that apply)	Number of visits since March 2020
New Hampshire		
Connecticut		
New York		

2

Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

CV questions are to capture consumer perceptions and behaviors relating to the COVID-19 pandemic.

CV1. How safe do each of these states feel to you as places to visit given the COVID-19 pandemic?

ROTATE	Very risky	Somewhat risky	Uncertain	Somewhat safe	Totally safe
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

CV2. How safe do each of these locations feel to you given the COVID-19 pandemic?

ROTATE	Very risky	Somewhat risky	Uncertain	Somewhat safe	Totally safe
Cities					
Mountains					
National and State Parks					
Small towns and rural destinations					
Lakes					
Restaurants					
Indoor attractions like museums					
Outdoor attractions like hiking trails					

CV3. Which of the following best describes your intended behavior within the next week?

I believe it is still safer to stay home and venture out as little as possible (only for essential items or because of my job as an essential worker)	
I will take recommended precautions, but I'm going to start adding more activities back into my routine	
I think restrictions have gone on too long and I'm going to resume as many normal activities as possible	

CV4. Which of the following best describes how you feel about traveling this fall/winter?

I would not even consider traveling any time soon	
I will wait and see what happens in the coming weeks before planning any trips	

3

I am ready to start planning a trip now	
I already have plans to travel this fall/winter	

CV5. Currently, how comfortable are you ...?

[ROTATE]	Not comfortable	Somewhat comfortable	Completely comfortable
Staying in the home of a friend or family member			
Staying in a homeshare like Airbnb or VRBO			
Staying in a hotel			
Attending a large outdoor event			
Attending a large indoor event			
Taking public transportation			

Questions 6-8 will be used to evaluate the impact of the advertising on information gathering and image of New Hampshire.

6. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?

1. Requested a New Hampshire Visitor's Guide
2. Visited the New Hampshire Tourism site, www.visitnh.gov
3. Visited the Visit New Hampshire Facebook page
4. Followed Visit New Hampshire on Twitter
5. Followed Visit New Hampshire on Instagram
6. Requested information about a New Hampshire trip in another way
7. Received e-newsletter
8. None of these

IF Q6=2, ASK Q7



VisitNH.gov Homepage.jpg

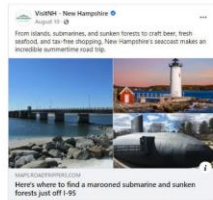
7. Is this the New Hampshire website you visited?

1. Yes
0. No

4

IF 6=3, ASK Q7A

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\FB_Coastline_in_NH



7a. Is this the New Hampshire Facebook page you accessed?

1. Yes
0. No

IF 6=7, ASK Q7B



NewEngland.com.jpg

7b. Is this similar to the New Hampshire e-newsletter you received?

1. Yes
0. No

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					

5

Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a good place to go to the beach					
Is a good place for water activities					

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)

Questions 9-23 will be used to understand New Hampshire trips, including party composition, trip activities and spending.

Now, please give us some information about the trip(s) you took to New Hampshire since March 2020.

9. When since March 2020 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- 3..... March 2020
- 4..... April 2020
- 5..... May 2020
- 6..... June 2020
- 7..... July 2020
- 8..... August 2020
- 9..... September 2020
- 10..... October 2020

Now we'd like to ask you some questions about your most recent trip to New Hampshire.

10_1. How many nights did you spend in New Hampshire during this trip? _____

10_2. Including you, how many people were in your travel party? _____

ASK Q10b if Q10_2 > 1

10b. Of those, how many were children under age 18? _____

ASK Q10c if Q10_1 > 0

10c. What forms of lodging did you use during your trip? Select all that apply.

Luxury resort hotel	
High-end full-service hotel	
Mid-level hotel	

6

Budget hotel or motel	
Bed and breakfast/Inn	
Airbnb	
Camping/RVing	
Home of family or friends	
Vacation home	
Other	

11. Which of the following activities did you participate in during your trip to New Hampshire? Select all that apply. [ROTATE]

Hiking or backpacking	Wildlife watching
Visiting a state or national park	Bird watching
Bicycling or mountain biking	Scenic drive
ATVing	Sightseeing tour
Rock climbing	Golfing
Horseback riding	Shopping
Hunting	Dining at locally owned restaurants
Camping	Visiting a noteworthy bar or nightclub
River rafting	Farm to table dinner
Fishing	Winery tours
Visiting museums	Beer trail
Attending a play or concert	Farmer's markets/U-picks/roadside stand
Attending a festival or fair	Canoeing or kayaking
Attending performing arts (music/theater)	Boating
Visiting historical sites	
	Other, please specify _____
	None of these

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to New Hampshire. You may choose up to 3.

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was...?

5. Excellent
4. Very good
3. Good
2. Fair
1. Poor

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind? _____

7

16. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...

Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"

Lodging/Accommodations _____
 Meals/Food/Groceries _____
 Entertainment/Attractions _____
 Shopping _____
 Entertainment such as shows, theater or concerts _____
 Transportation to New Hampshire _____
 Transportation within New Hampshire _____
 Other _____
 Total SHOW TOTAL _____

17. Thinking about this trip, how far in advance did you begin to plan?

- 1...Less than 1 week
- 2...1 to 2 weeks
- 3...2 to 3 weeks
- 4...3 to 4 weeks
- 5...1 to 2 months
- 6...3 to 4 months
- 7...More than 4 months in advance
- 8...Don't know

18. Did you post any information about this trip on the following outlets? Select all that apply.

1. Facebook
2. Twitter
3. Flickr
4. YouTube
5. Blogs
6. Instagram
7. Pinterest
8. None of these

19. How likely are you to recommend a trip to New Hampshire?

1. Very likely
2. Somewhat likely
3. Not likely

8

This next section will be used to measure recall of New Hampshire advertising.

20. Have you seen any advertising for New Hampshire as a travel destination?
1. Yes → ASK 20a
 0. No

20a. What do you recall about the ads? _____

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

Digital Banner

New Hampshire Only:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\NH In_State\Display ads



Spread: DTTD_HTML5 In State.jpg



Spread: DTTD_Summer_AdTheorent_Expandable_Banner In State.JPG

All Others:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\Out of State\Display ads



Spread: DTTD_HTML5 Banners OOS.JPG



1-DTTD_HTML5 Banners OOS	2-DTTD_HTML5 Banners OOS	3-DTTD_HTML5 Banners OOS	4-DTTD_HTML5 Banners OOS	5-DTTD_HTML5 Banners OOS	6-DTTD_HTML5 Banners OOS
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Spread: DTTD_Summer_AdTheorent_Expandable_Banner OOS.JPG

Summer Digital. Have you seen this or similar online ad before now?

- Yes, I have seen this ad before
- No, I have not seen this ad before

SummerDigitalB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative – ASK SummerDigitalC

SummerDigitalC. Why do you feel that way? _____

Social Ads

New Hampshire Only:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\NH In_State\Social ads

IGSNAP_15_MOUNTAINS.mp4	IGSNAP_15_ATTRACTIONS.mp4	IGSNAP_15_LAKES.mp4
464317949	464318869	464320946

All Others:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\Out of State\Social ads



NH TOURISM 30_Out of State_VERTICAL.mp4
464334497

SummerSocial. Please indicate if you have seen each of these social media ads before.

- Yes, I have seen this ad before
- No, I have not seen this ad before

SummerSocialB. What is your reaction to these ads?

- 1. Positive
- 2. Neutral
- 3. Negative – ASK SummerSocialC

SummerSocialC. Why do you feel that way? _____

TV

New Hampshire Only:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\NH In_State\TV



DRED5541_Summer30_WITH-VO.mp4
464311827

All Others:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\Out of State\TV



DRED5541_Summer30_ORIGINAL_NO-VO.mp4
464337273

11

ASK TV SERIES FOR EACH SPOT

SummerTV. How many times have you seen this or a similar ad for New Hampshire?

- 3. More than three times
- 2. Two or three times
- 1. Once
- 0. Never

SummerTVB. What is your reaction to this ad?

- 1. Positive
- 2. Neutral
- 3. Negative – ASK SummerTVC

SummerTVC. Why do you feel that way? _____

RADIO:

New Hampshire Only:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\NH In_State\Streaming Radio



DTTD5541_300x250_Pandora_IN STATE.jpg
NH TOURISM SUMMER - RADIO_IN STATE_30.wav



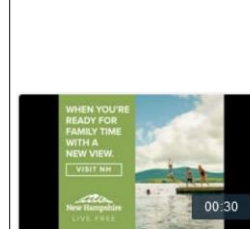
NH TOURISM SUMMER - RADIO_IN STATE_30.mp4
464331126

All Others:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\Out of State\Streaming Radio



DTTD5541_300x250_Pandora_OUT OF STATE.png
DTTD_Summer_Pandora Radio Spot_OOS.mp3



DTTD_Summer_Pandora Radio Spot_OOS.mp4
464341899

12

ASK FOR EACH RADIO AD

SummerActivity. How many times have you heard this or a similar ad for New Hampshire?

3. More than three times
2. Two or three times
1. Once
0. Never

ASK AFTER ALL RADIO ADS. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK SummerActivityC

SummerActivityC. Why do you feel that way? _____

OOH

SHOW ALL ADS FOR EACH MARKET ON THE SAME SCREEN

New Hampshire Only:

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\NH In_State\OOH



DTTD_Outfront-NH_577BJO_hike_10x40.jpg

DTTD_Outfront-NH_677CO_lake_10x24.jpg

I:\Ads Master\New Hampshire\2020\Summer Awareness\Assets for survey\Out of State\OOH

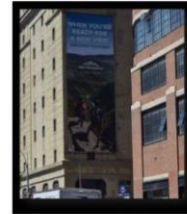
BOSTON ONLY:



Boston Transit - OOH

13

NYC ONLY:



NYC Billboard_OOS



NYC_RI_CT_MA Billboard_OOS

SHOW ALL ON ONE PAGE; ASK FOR EACH AD

SummerOutdoor1. Have you seen this New Hampshire ad before??

- ☐ Yes, I have seen this ad before
- ☐ No, I have not seen this ad before

ASK AFTER ALL ADS

SummerOutdoorB1. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK SummerOutdoorC1

SummerOutdoorC1. Why do you feel that way? _____

SHOW ALL ON ONE PAGE; ASK FOR EACH AD

SummerOutdoor. Please indicate if you have seen each of these ads before.

- ☐ Yes, I have seen this ad before
- ☐ No, I have not seen this ad before

ASK AFTER ALL ADS

SummerOutdoorB. What is your reaction to these ads?

4. Positive
5. Neutral
6. Negative – ASK SummerOutdoorC

SummerOutdoorC. Why do you feel that way? _____

14

Questions 21-22 will be used to evaluate the messaging of the advertising campaign.

21. Given all of these ads together, how much do you agree that this campaign shows a place...? ROTATE

MAYBE ADD SOME COVID-SPECIFIC ATTRIBUTES DEPENDING ON WHAT THE ADS SAY	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

22. How much do you agree that these ads make you...? ROTATE

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

RS questions are to capture resident sentiment toward tourism

RS1.

FOR NEW HAMPSHIRE RESIDENTS: Again, thinking about the ads that you just saw, how much do you agree that this tax-funded tourism promotion is good for your community?

FOR NON-NEW HAMPSHIRE RESIDENTS: Nearly every state runs advertising to attract tourists. Overall, how much do you agree that tax-funded tourism promotion is good for your community?

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
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RS2. Overall, how much do you agree that tourism is good for your community? Would you say you...?

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
-------------------	-------------------	----------------------------	----------------	----------------

RS3. How much do you agree with this statement? *I am proud of the state where I live.*

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
-------------------	-------------------	----------------------------	----------------	----------------

15

The following questions detail demographics.

DEMOS [DO NOT FORCE]

The following questions are for classification purposes only so that your responses may be grouped with those of others.

marital. Are you currently ...?

Married/living as married
Divorced/Separated
Widowed
Single/Never married

ppinHH. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]

kids. How many children under the age of 18 live in your household? _____

education. Which of the following categories represents the last grade of school you completed?

High school or less
Some college/technical school
College graduate
Post-graduate degree

income. Which of the following categories best represents your total annual household income before taxes?

Less than \$35,000
\$35,000 but less than \$50,000
\$50,000 but less than \$75,000
\$75,000 but less than \$100,000
\$100,000 but less than \$150,000
\$150,000 but less than \$200,000
\$200,000 or more

ethnicity. What is your race/ethnicity? *Select all that apply.*

African-American/black
Asian/Pacific Islander
Caucasian/white
Latino/Hispanic
Mixed ethnicity
American Indian
Other, please specify _____

Gender. What is your preferred gender identity ...?

Male
Female
Other
Prefer not to answer

16